

To: Wangerud, Ken[wangerud.ken@epa.gov]; Murray, Bill[Murray.Bill@epa.gov]
From: Wharton, Steve
Sent: Tue 5/12/2015 2:45:48 PM
Subject: RE: re EPA Sharepoint site for USMag-RPM

Ken – I'd suggest you talk with Dania Zinner or Liz Fagen regarding the SharePoint sites they have used for Libby and Upper Animas, respectively.

From: Wangerud, Ken
Sent: Tuesday, May 12, 2015 7:40 AM
To: Wharton, Steve; Murray, Bill
Subject: re EPA Sharepoint site for USMag-RPM

Does Superfund Remedial program have any other Sites that have used 'Quickr' or plan to use 'Sharepoint' for team collaboration?

Have any of such sites been subject to litigation hold requirements?

The email string below is instructive w/r/t what the USMag project has done and will continue to need.

Thanks.

Ken

Ken Wangerud, Remedial Project Manager

Superfund Remedial Program

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From: Moores, Steven
Sent: Monday, May 11, 2015 2:44 PM
To: Wangerud, Ken
Subject: RE: EPA Sharepoint site for USMag-RPM

If you create an agency record, it will need to go into SEMS (formerly called SDMS).

Here is some Agency website guidance, from <http://www.epa.gov/records/what/quest2.htm>

What is a Record?

Records include all books, papers, maps, photographs, machine readable materials, or other recorded information, regardless of physical form or characteristics, made or received by an agency of the United States Government under Federal law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operations, or other activities of the Government or because of the informational value in them.
(Taken from 44 U.S.C. Chapter 33, Sec. 3301)

Several key terms, phrases, and concepts in the statutory definition of records are defined as follows:

1. **Documentary materials** is a collective term for records, nonrecord materials, and personal papers that refers to all media containing recorded information, regardless of the nature of the media or the method(s) or circumstance(s) of recording.
2. **Regardless of physical form or characteristics** means that the medium may be paper, film, disk, or other physical type or form; and that the method of recording may be manual, mechanical, photographic, electronic, or any other combination of these or other technologies.
3. **Made** means the act of creating and recording information by agency personnel in the course of their official duties, regardless of the method(s) or the medium involved. The act of recording is generally identifiable by the circulation of the information to others or by placing it in files accessible to others.
4. **Received** means the acceptance or collection of documentary materials by agency personnel in the course of their official duties regardless of their origin (for example, other units of their agency, private citizens, public officials, other agencies, contractors, Government grantees) and regardless of how transmitted (in person or by messenger, mail, electronic means, or by any other method). In this context, the term does not refer to misdirected materials. It may or may not refer to loaned or seized materials depending on the conditions under which such materials came into agency custody or were used by the agency. Advice of legal counsel should be sought regarding the "record"

status of loaned or seized materials.

5. **Preserved** means the filing, storing, or any other method of systematically maintaining documentary materials by the agency. This term covers materials not only actually filed or otherwise systematically maintained but also those temporarily removed from existing filing systems.

6. **Appropriate for preservation** means documentary materials made or received which in the judgment of the agency should be filed, stored, or otherwise systematically maintained by an agency because of the evidence of agency activities or information they contain, even though the materials may not be covered by its current filing or maintenance procedures.

(Taken from the Code of Federal Regulations Part 1222, Subpart A, Sec. 1222.10)

From: Wangerud, Ken
Sent: Monday, May 11, 2015 2:35 PM
To: Moores, Steven
Subject: RE: EPA Sharepoint site for USMag-RPM

Not at the working-documents stage, unless I am assigned an administrative file-clerk who can transmit each and every email and working-attachment your way via ExpressLinks.

But YES, as they all eventually become part of Draft & FINAL SAPs or REPORTs (for Agency review-comment) and are also part of the planning/meeting-records of Worksheet#9 in UFPQAPPS, whereby the emails/content makes it's way into SDMS & the AR.

How we doing here?

Ken Wangerud, Remedial Project Manager

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From: Moores, Steven
Sent: Monday, May 11, 2015 2:03 PM
To: Wangerud, Ken
Subject: RE: EPA Sharepoint site for USMag-RPM

Thanks. I never used Quickr. Will all the Sharepoint documents be available in SDMS?

From: Wangerud, Ken
Sent: Monday, May 11, 2015 1:59 PM
To: Moores, Steven
Cc: Mosal, Jeffrey; Wharton, Steve; Selle, Tony
Subject: RE: EPA Sharepoint site for USMag-RPM

StevenM:

If you want to see pertinent documents for the Site, you will access them via Sharepoint. In no way is this to replace ExpressLinks/SDMS.

For a couple of years I maintained a 'Quickr Site' for the USMag project. This was EPA's platform as an ftp (file transfer protocol) tool.

I had it organized by 'rooms', to which member-access was restricted to only certain users, such as:

EPA-Staff only

EPA & UDEQ staff

EPA-UDEQ staff & Contractors

EPA-FWS-BLM staff

EPA-UDEQ & USMag Contractors (this is where ERM could post numerous draft documents for EPA-UDEQ access & review—especially large data-files)

Each of these 'rooms', had different topical 'file-folders', in which 'access-cleared' room-members could 'share' documents ranging from preliminary-drafts in development, all the way to final SAPs and Data Reports. Documents pertinent to the Administrative Record were/are placed separately via ExpressLinks/SDMS into Record Center.

Besides being a central sharing location for team members and collaboration/exchange of documents and data, this technology is the only means (short of CD/DVDs, for which new computers aren't even equipped, and snail-mail) for documents that have very large file-size...often exceeding email server limitations. We need this platform so support exchange of work-products with Agency-Contractors, and also RP-Contractors.

Sharepoint is EPA's new replacement for Quickr, and staff agency-wide are encouraged to make it our 'working platform' for the project(s) world of EPA in the digital age. EPA-HQ seems to have taken a nicely-functioning Quickr-ftp site, and made it into something so different that I have enlisted Jeff Mosal to help rebuild a useable/functioning platform.

Please advise how this platform can be made subject to Lit-Hold provisions.

Cheers,

Ken

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From: Moores, Steven
Sent: Monday, May 11, 2015 12:21 PM
To: Mosal, Jeffrey
Cc: Wangerud, Ken
Subject: RE: Mosal, Jeffrey has invited you to 'EPA staff only'

Jeffrey – Can you tell me what it is about the USM site that I’m supposed to receive over Sharepoint?

I’m concerned about creating more documents and communications that will be subject to a litigation hold.

Thanks,

Steven

From: Mosal, Jeffrey [<mailto:Mosal.Jeffrey@epa.gov>]
Sent: Monday, May 11, 2015 12:14 PM
To: Moores, Steven; Mosal, Jeffrey; OBrien, Wendy; Schmidt, Andrew; Wharton, Steve; Wieber, John; Wall, Dan
Cc: Mosal, Jeffrey
Subject: Mosal, Jeffrey has invited you to 'EPA staff only'

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